



**STATE PROCUREMENT OFFICE
NOTICE & REQUEST FOR SOLE SOURCE**

TO: Chief Procurement Officer

FROM: Native Hawaiian Revolving Loan Fund
Name of Requesting Department

Pursuant to HRS §103D-306 and HAR chapter 3-122, Subchapter 9, the Department requests sole source approval to purchase the following:

1. Describe the goods, services, or construction to be procured.
To provide online and on-site loan software support and maintenance, loan software upgrades, latest version of tax related documents, remote access to address any issues/ and or questions, and remote access to loan structuring to address issues. To provide Annual Cloud hosting which allows for online applications and indicates status of application, workflow and task, alert capabilities, provides latest version of all cloud based functions, and cloud based backups.

2. Vendor/Contractor/Service Provider Name: BMI Associates, Inc. dba Portfol Software	3. Amount of Request: \$14,709.00
4. Term of contract (shall not exceed 12 months), if applicable: From: <u>1-Jan-25</u> To: <u>2-Nov-25</u>	5. Prior SPO-001, Sole Source (SS) No.: <u>25-05</u>

6. Describe in detail the following:

a. The unique features, characteristics, or capabilities of the goods, service or construction.
The service provided are for the Portfol loan software system, which BMI is the only organization that can provide these services as stated on March 25, 2020 per Sole Source No. 2020-05.

b. How the unique features, characteristics or capabilities of the goods, service or construction are essential for the department
The NHRLF program would not be able to operate Portfol Loan Software, which means the program could no longer process or service loans in any capacity.

7. Describe the efforts and results in determining that this is the only vendor/contractor/service provider who can provide the goods, services or construction.

The NHRLF staff contacted the five loan software providers and none of these providers were licensed to provide services for Portfol Loan Software. NHRLF also discussed with the President of BMI Associates Inc. Boyd Mortensen and he indicted BMI Associates Inc. dba Portfol Software had not lisensed anyone to provide technical assistance for Portfol Loan Software as stated on March 25, 2020 per Sole Source No. 2020-05.

8. Alternate source. Describe the other possible sources for the goods, services, or construction that were investigated but did not meet the department's needs.

The NHRLF staff contacted Oracle, Turnkey Lender, Nothridge Lending System, Loan Pro Services, and Blend as stated on March 25, 2020 per Sole Source no. 2020-05.

9. Identify the primary responsible staff person(s) conducting and managing this procurement. (Appropriate delegated procurement authority and completion of mandatory training required.)

*Point of contact (Place asterisk after name of person to contact for additional information).

Name	Division/Agency	Phone Number	E-mail Address
KARINA MACKLIN	OHA PROCUREMENT	808 594-1888	KARINAM@OHA.ORG

Department shall ensure adherence to applicable administrative and statutory requirements, including HAR chapter 3-122, Subchapter 15, Cost or Pricing Data if required.

***All requirements/approvals and internal controls for this expenditure is the responsibility of the department.
I certify that the information provided is to the best of my knowledge, true and correct.***



Department Head Signature

May 2, 2025

Date

For Chief Procurement Officer Use Only

Date Notice Posted: _____

Submit written objection to this notice to issue a sole source contract within seven calendar days or as otherwise allowed from date notice posted to:

state.procurement.office@hawaii.gov

Chief Procurement Officer (CPO) Comments:

- Approved Disapproved No Action Required

Chief Procurement Officer Signature Date